Direct Access
Quick Reference Guide

Employee Review

CUSTOMER SUPPORT

Customer Care: 866.PSC.USCG (772.8724)/785.339.2200
Email: PSC CustomerCare@hrsic.uscg.mil
On-line Help: http://cgweb.psc.uscg.mil/ps
Self-Service Tutorials: http://www.uscg.mil/hq/psc/training/
User Access Form (PSC-7421/2): http://www.uscg.mil/hq/psc/forms

EMPLOYEE REVIEW

➢ Before you begin, if possible, have member's Employee ID number. If you do not have member's Employee ID number, you may perform a search and select from the list that is displayed as a result of your search criteria. For information on searching, reference the Direct Access On-Line Help at **http://cgweb.psc.uscg.mil/ps**. *(Select Using PeopleSoft, then select Search Tips).*

➢ Your view of any menu or page is dependent on your access level (user role) and the security settings associated with that access. Your Operator ID may not have access to all the pages we include in this guide, or we may show a field as editable, but your access is "View Only".

➢ Command User (CGSSCMD) or Employee Review Only (CGEMPREV) access is required to complete an Employee Review. To request this access, complete form CG PSC-7421/2 User Authorization/Revocation (from PSC's Forms Page at http://www.uscg.mil/hq/psc/forms/). Fax completed form to (785) 339-3772.

➢ If you change the **Effective** or **To** date, **all** data entered in the Employee Review will be lost.

➢ The path to access Employee Review is: Develop Workforce > Plan Careers > Use > Employee Review.

Employee Review
Find an Existing V...

Develop Workforce > Plan Careers > Use > Employee Review

EmplID: 1234567
Empl Rcd Nbr:
Name:
Last Name:
SetID: AUSCG
Department:
National ID: 123456789
Job Family:
Job Code: 4
Company:
Search

Enter Employee ID number in the EmplID field.
OR
Enter SSN in the National ID field.

Click "Search" after entering Employee ID number or SSN.

➢ It is not necessary to enter data in all fields. Preferred method is to enter Employee ID number (EmplID field) **or** SSN (National ID field).

➢ If you do not know the Employee ID or SSN, provide some search criteria, such as member's last name or member's name in the appropriate fields and perform a search.

➢ Since an employee may have multiple records, reflecting various stages in their career (military, civilian, reservist) or the result may list several members with the same last name and/or first name, **it is important to select the correct record from the result list.**

EMPLOYEE REVIEW *(continuation)*

➢ **Page defaults to Employee Review tab. Additional tabs include Reviewers, Comments, and Exceptions. This guide includes instruction on all tabs.**

➢ **You can save your work at anytime during this process.** The review does not have to be completed before you can save it. Frequent saves prevent the loss of data in the event of computer problems. After the review is saved, you can exit the system and return to it later to finish up.

➢ **Employee Review Tab - Fields which must be completed:**
Effective Date (Enter the period end date)
To Date (Enter the period end date)
Review Type
Rating Scale

Note: If the Effective or To date is changed after data is entered in other fields, all data entered in the Employee Review will be lost.

➢ **Employee Review Tab - Fields which may be left blank:**
From Date
Next Review Date

Enter the **period end date** in the **Effective** date field **and** the **To** date field.

Page Defaults to the Employee Review Tab

Home > Develop Workforce > Plan Careers > Use > Employee Review   New Window

Employee Review | Reviewers | Comments | Exceptions

Employee Name   Employee   ID: 1234567   Empl Rcd#: 0

Review Details   View All   First 1 of 1 Last

*Effective Date: 05/31/2002   Review Type: Regular
From/To Date: _____ 05/31/2002   Next Review Date:
Business Unit: AUSCG   All U. S. Coast Guard Units
Department: 000450   CG HRSIC
Job Code: 436093   First Class Yeoman
Rating Scale: E6   First Class PO Review
Rating Model: EVAL   Enlisted Performance Eval

Click the **Review Type drop-down arrow** and select the appropriate type.

Enter the appropriate rate (E1, E2, E3, etc..) or click on the magnifying glass to the right of the Rating Scale field and follow the steps below to select a Rating.

Lookup Rating Scale

Rating Scale:
Description:
Look... | Clear | Cancel | Ba...

Click on **Lookup** or enter criteria in the Description field then click **Lookup**. Refer to Direct Access On-Line Help or Basics 101 User Guide for entering criteria.

Search Results

View All   First 1-...

Rating Scale Description	
E1	Seaman Re...
E2	Seaman Appre...
E3	Seaman Revie...
E4	Third Class PO...
E5	Second Class P...
E6	First Class PO Review
E7	Chief Petty Officer Review

Select **Rating** (E-1 thru E-9) or **Description**. Do not use CPO, DUI1, etc. Once you click on the rating or description it will return to the Employee Review page and automatically fill-in the field and display the description to the right of the field.

EMPLOYEE REVIEW *(continuation)*

After entering the necessary information on the **Employee Review** page, click the **Reviewers** tab at the top of the page.

➢ **Evaluation Type.** Click on the Evaluation Type drop-down arrow and select the appropriate type.

➢ **Reviewer ID.** Enter or lookup the Employee ID number of the reviewer.

➢ The competencies (e.g. Directing Others, etc..) listed are based on the rating scale entered on the first page.

➢ Use the numeric values to rate all competencies except **Conduct** and **Recommendation for Advancement.**

➢ Use **Satisfactory** or **Unsatisfactory** to rate the **Conduct** competency. *(A message will display indicating the alpha characters will not compute for the rating average, click **OK**.)*

➢ Use **Recommended for Adv** or **Not Recommended for Adv** to rate the **Recommendation for Advancement** competency. E-6's and above require comments justifying the members future potential for leadership. *(A message will display indicating the alpha characters will not compute for the rating average, click **OK**.)*

➢ Click on the 🖳 (Note) button to view the full description of the competency and enter Comments in the Comment section. **These comments replace the Administrative Remarks (CG-3307).**

Click on the Reviewers Tab

For each competency, enter the rating numeric or alpha value, or click on magnifying glass to lookup available Rating choices. **Reminder:** You can save your work at any time. The review does not have to be completed before you can save it. Frequent saves prevent the loss of data in the event of computer problems.

Click on the **Evaluation Type** drop-down arrow and select the Evaluation Type.

Enter the **Employee ID** of the **reviewer** or use the magnifying glass to lookup Reviewers ID

Click on the **Note** button to view full description of competency and enter comments. These comments replace the Administrative Remarks CG-3307.

You will receive this warning when entering an alpha code for the Conduct and Recommended/Not Recommended for Adv competency. Click **OK**. You can safely ignore this warning.

Warning -- Non-numeric ratings cannot be averaged. (1020,16)

The ratings you have defined are alpha values and cannot be used to calculate a weighted average. Please use numeric values if you wish to use the averaging functionality with this rating scale.

OK
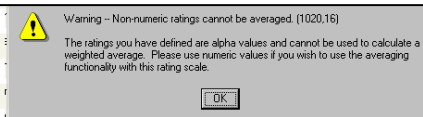
EMPLOYEE REVIEW *(continuation)*

Lookup Rating

Lookup Rating

Click on **Lookup** or enter criteria in the Description field then click **Lookup**. Refer to On-Line Help or Basics 101 User Guide for entering criteria.

Search Results

Review Rating Description	Short Description
1	Unacceptable — Unaccept
2	Poor — Poor
3	Below Standard — Belw Stand
4	Average — Average
5	Above Average — Above Avrg
6	Excellent — Excellent
7	Superior — Superior
N	Not Recommended for Adv — No Adv
R	Recommended for Adv — Rec Adv
S	Satisfactory — SAT
U	Unsatisfactory — UNSAT

Select the appropriate **Review Rating, Description** or **Short Description** from the list. Once you click on the rating or description it will return to the Reviewers page and automatically fill-in the field and display a short description to the right of the field. See the notes above to determine whether you should use the numeric or alpha codes.

Competency and Comment Screen *(Displayed after selecting the NOTE button.)*

A full description of the competency is displayed.

Comments are required for Ratings of 1, 2, 7, N-Not Recommended for Advancement, U-Unsatisfactory Conduct and E-6's and above require comments justifying leadership potential. These comments replace the Administrative Remarks (CG-3307). **Note:** You can cut and paste from another application such as Word, Notepad, etc.., be aware that apostrophes ('), quotes (") and other special characters will not display correctly after your save the text, renter any of these characters before saving.

Once comments have been entered, click OK. **The system will automatically return to the** Reviewers **page.**

After entering the necessary information on the **Reviewers** page, click the **Comments** tab at the top of the page.

➢ Comments entered here are for **internal routing use only** and will not be saved in the final Employee Review.

➢ Do not enter comments here for Ratings of 1, 2, 7, N, U or leadership potential for E-6's and above. Enter those comments under the Reviewers tab. *(See previous instruction on entering comments for ratings of 1, 2, 7, N, U or leadership potential for E-6's and above.)*

Click on the Comments Tab

Enter comments you may want to forward to your Supervisor, Approving Official, etc..

EMPLOYEE REVIEW (continuation)

After entering the necessary information on the **Comments** page, click the **Exceptions** tab at the top of the page.

➢ Enter the Employee ID number of the next person to review this Employee Review.

➢ Click the **Validate Employee Review** button. Review the exceptions to see if any changes to the Employee Review are required. After changes have been made, click on **Validate Employee Review** again. Repeat until exceptions are corrected. Note: You can safely ignore this warning "**All marks with Rating Model of EVAL must have the Evaluation Type set to A (Approved Official). Evaluation Type=R**," unless you are the Approving Official.

➢ Press **Save.**

- **If you are not the final Approving Official:**
  - ❖ Press **Submit. OR**
  - ❖ Print the **Member Counseling Report,** then press **Submit**.

> The **Member Counseling Report** is a printout of the Employee Review with the Reviewer Comments (PG-7's), requiring signature by the counselor and the evaluee. Refer to the instructions in this guide to print the Member Counseling Report.

- **If you are the final Approving Official, ensure a Member Counseling Report is printed prior to selecting the Final box.** Click the **Final** checkbox and then the **Submit** button.

  Once the Final box is checked, you will not be able to view or change the Employee Review, nor will you be able to print the Member Counseling Report. If you need to recall the Employee Review contact PSC (ADV) via email to **psc-adv@hrsic.uscg.mil** or call (785) 339-3400.

➢ After clicking **Submit**, the Employee Review is routed to either the Endorser's Worklist, or if final is checked, to PSC (ADV) pending review and forwarding to the members Employee Review Summary (formerly CG-3306). *(For information on accessing your Worklist, refer to the On-Line Help   http://cgweb.psc.uscg.mil/pss   ).* If an Employee Review is submitted multiple times to an endorser, it will display multiple times in the endorser's Worklist; however, only the latest version will display when the endorser accesses any of the multiple links.

➢ To repeat this function for another Employee, select **Return to Search**.

Click on the Exceptions Tab

Enter your endorser's Employee ID or use the lookup to locate their Employee ID number.

Click **Validate Employee Review**. A list of exceptions (discrepancies) will appear. Review the exceptions and make any necessary changes. After changes have been made, click on **Validate Employee Review** again. Repeat until exceptions are corrected.

After exceptions are corrected, click **Save.**

Refer to the next section of this guide for instructions on the **Member Counseling Report** before clicking **Submit** or checking the **Final** box.

EMPLOYEE REVIEW – MEMBER COUNSELING REPORT (continuation)

After an Employee Review is verified by an Approving Official, a **Member Counseling Report** should be printed. This is a printout of the Employee Review with the Reviewer Comments (PG-7's), requiring signature by the counselor and the evaluee.

After entering and saving all necessary information, click on the **Member Counseling Report** link located on the **Exception** page.

Click on the Exceptions Tab

Click on Member Counseling Report link

➢ After clicking on the **Member Counseling Report link** the **Member Counseling Receipt** page is displayed.

➢ **Language** defaults to English.

➢ Enter the Employee ID number of the evaluee in the **Report Requests Parameters** box. If you do not know the Employee ID number you may:

- Close the window by clicking the **X** in the top right corner and locate the Employee ID number from the **Exceptions** page **ID** field, then re-select the **Member Counseling Report** link. **OR**

- Click on the magnifying glass to the right of the Employee ID field and perform a search. For information on performing a search, reference the On-Line Help at   http://cgweb.psc.uscg.mil/ps   .

NOTE: You may generate more than one report by pressing the ⊞ button to add a new row and enter another Employee ID number. Repeat this step to enter additional Employee ID numbers.

➢ Click the Run button (upper right hand corner of the page) to begin processing.

After entering the Employee ID number(s), click **Run**.

Enter the **Employee ID number**. If you do not know the Employee ID number, click on the magnifying glass to perform a search or refer to the instructions above to locate the Employee ID number.

Click the **"+"** if you wish to add additional Employee ID numbers.

After clicking **RUN** from the Member Counseling Receipt page, the **Process Scheduler Request** page will appear.

➤ Click on the **Server Name drop-down arrow** and select **PSUNX**.

➤ Click on the **Type drop-down arrow** and select **Email**. By selecting **Email** the Member Counseling Report will be sent to you as an attachment to an email message (recommended). The attachment will be in **PDF** (Adobe Acrobat) format. You may leave the type as **Web** if you want to access the Member Counseling Report using the Report Manager (**Web** instructions are in the next section).

➤ **Format** defaults to **PDF**. Leave as PDF, do not change the format.

➤ **If you selected Email as the type:**

• Click on **OK** (bottom left corner of page) and this will generate the email to you. **OR**

• Click on the Distribution icon to add additional email addresses. This is helpful if you would like to email the Employee Review to additional recipients. Refer to instructions below for using the Distribution icon.

Process Scheduler Request

Home > Develop Workforce > Plan Careers > Report > Memb

Process Scheduler Request

User ID: 1234567

Server Name: PSUNX
Recurrence:
Time Zone:
Run Date: 07/11/2002
Run Time: 5:03:26PM
Reset to Current Date/Time

Click on the **Server Name drop-down arrow** and select **PSUNX.**

Process List
Select Description Process Name Process Type *Type *Format
☑ Employee Revie   Email PDF

Leave **Format** as **PDF**.

Click on the **Type drop-down arrow** and select **Email**. If you select **Web**, refer to the instructions in the next section.

Click on the **Distribution Icon** if you wish to email additional recipients a copy of the Employee Review.

OK   Cancel

Click **OK**.

Distribution Detail
(Displayed if Distribution icon is selected)

Home > Develop Workforce > Plan Careers > Rep

Distribution Detail

Process Name: CGEERCPT

Process Type: SQR Report

Distribute To
ID Type *Distribution ID
User 1234567

Click the **"+"** button to add a new row, then enter the Employee ID number in the **Distribution ID** field. If you do not know the recipient's Employee ID number, lookup the number by clicking on the magnifying glass.

Email Only
Email Subject:
This is the subject line of the
Message Text:
Enter any messages you wo

Enter a **Subject** in the **Subject** field and/or a **message** in the **message** field. **These are optional.**

OR

Email With Log ☑
Email Address List:
your_email@your_email_address.mil
additional_email@addl_address.mil

Enter recipient(s) email address(es) in the **Email Address List** box. Enter each email address on a separate line.

OK   Cancel

If you chose **Web** from the Process Scheduler Request screen, you will need to click on **Report Manager** from the **Member Counseling Receipt** page.

➤ Find the **Process Instance**. You may need to reference the date and time to determine which one is the correct instance.

➤ Click the **View** link to the right of the instance you want to view. This will cause a new **Internet Explorer** window to open. The **Report/Log Viewer** page will display.

If the **View** link is not shown, click the **Refresh** button to update the display. There could be some delay before the Employee Review is ready for viewing.

➤ When the **Report/Log Viewer** page appears, locate the **link** that has a **PDF** extension. (Link name should read similar to **cgeercpt_xxxxx.pdf**. The **xxxxx** in the link will be replaced with the Process Instance number.) **Click on the link to open the Employee Review form.**

➤ Click on the **Printer** icon (upper left corner) of the Acrobat window to print the form.

Member Counseling Receipt

Member Counseling Receipt

Run C
Language: English

Click on **Report Manager**.

Report Manager   Process Monitor   Run

Enter an Emplid or Enter Board

Flush

Enter Board Information
Brd Type Cd: AD/Res Ind:Sequence:

Execute

Report Request Parameters   View All   First ◀ 1 of 1 ▶ Last

1234567 Employee Name + −

Report Manager Screen

Report List   Archived Reports
View Reports For
User: 1234567
Status: Last: 1   Days

Locate the Process Instance number, click on **View**. If View is not available, click on **Refresh**.

Refresh

Report List   View All   First ◀ 1 of 1 ▶ List
Select Report ID Prcs Instance Report Description Request Date/Time Format Status Details
☐ 2814 12772 Employee Review Receipt 07/11/2002 5:13:46PM Acrobat (*.pdf) Posted Details View

Report/Log Viewer

Instance: 12772 Type: SQR Report
Name: CGEERCPT Run Cntl ID: REPORT
Status: Success Submitted By: 1234567
Server: PSUNX Recurrence:

Employee Review Receipt

Name Size Cr
Message Log 1090 bytes 2002-07-11 21:22:07
Trace File 0 bytes 2002-07-11 21:13:57
cgeercpt_12772.PDF 3714 bytes 2002-07-11 21:22:07

Locate the link with the **PDF** extension. Click on the link.

Acrobat Window

File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print
Address http://cghrmsdev.osc.uscg.mil:7030/servlets/psreports/hlst/2830/cgeercpt_12788.PDF

Click the **Printer Icon** to print the Employee Review.
Click the **Disk Icon** to save it

Member Counseling Receipt

Emplid
Eff Da   ular
From: 31/2002
Next P

Busine   uard Units
Department
Company: CGA Active Coast Guard Employees
Job Code: 12345 First Class Yeoman
Position: 12345678 Active

Rating Scale: E6 First Class PO Review
Rating Model: EVAL Enlisted Performance Eval